

### Abstract of the Invention

5           A portfolio-tracking module having a displayable summary interface  
is provided within a software suite for enabling viewing and manipulation of  
multiple categories of aggregated data compiled from a plurality of data  
sources and accessible through a single interfacing node operated on a data-  
packet-network.. The portfolio-tracking module comprises, an interactive  
10   main interface accessible through the summary interface, the main interface  
for listing stocks and investment accounts for viewing, an interactive menu  
provided within the main interface for selecting views of individual  
investment accounts, the views appearing within the same or within a  
secondary interface, an interactive selection interface provided within the  
15   main interface for selecting investment accounts for data tracking, a first  
interactive hyperlink embedded within the main interface for linking the main  
interface to a secondary interface for viewing tracked information about  
personal investments and a second interactive hyperlink embedded within the  
main interface for linking the main interface to a secondary configuration  
20   interface for adding new investment accounts or stocks for tracking. A user  
working from within the module may interact with selected ones of  
interactive links for the purpose of invoking a variety of secondary interfaces  
containing more detailed information about registered investments, financial  
accounts, and performance data about stocks.

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